



CANNON BUILDING
861 SILVER LAKE BLVD., SUITE 203
DOVER, DELAWARE 19904-2467

**STATE OF DELAWARE
BOARD OF ACCOUNTANCY**

TELEPHONE: (302) 744-4500
FAX: (302) 739-2711
WEBSITE: DPR.DELAWARE.GOV
EMAIL: customerservice.dpr@state.de.us

PUBLIC MEETING MINUTES:	BOARD OF ACCOUNTANCY
DATA AND TIME:	Wednesday, June 21, 2017 at 9:00 a.m.
PLACE:	861 Silver Lake Boulevard, Dover, Delaware Conference Room B , second floor of the Cannon Building
MINUTES APPROVED:	July 19, 2017

MEMBERS PRESENT

Kathryn Schultz, Professional Member, President
Alison Houck, Professional Member, Secretary
John McManus, Professional Member
Sarah Patterson, Professional Member
Araya Debessay, Educational Member
Prameela Kaza, Public Member
Karen Smith, Professional Member

ABSENT

Richard Snyder, Public Member
Susan Benson, Professional Member

DIVISION STAFF/DEPUTY ATTORNEY GENERAL

Kevin Maloney, Deputy Attorney General
LaTonya Brown, Administrative Specialist II

ALSO PRESENT

Dana Rubenstein, DSCPA
Stephanie Saunders, NASBA: VA BOA

CALL TO ORDER

Ms. Schultz called the meeting to order at 9:17 a.m.

REVIEW OF MINUTES

A motion was made by Mr. McManus, seconded by Ms. Kaza, to approve the minutes dated May 17, 2017. The motion carried unanimously.

Unfinished Business

Re-Review of Applications

Chuyi Liang

A motion was made by Ms. Patterson, seconded by Ms. Kaza, to approve the CPA Permit to Practice application of Chuyi Liang. The motion carried unanimously.

Wilson Man

A motion was made by Ms. Patterson, seconded by Ms. Kaza, to approve the CPA Permit to Practice application of Wilson Man. The motion carried unanimously.

Re-Review of Delaware Specific Ethics Course

American CPE

A motion was made by Mr. McManus, seconded by Mr. Debessay, to approve the ethics course contingent upon a few amendments. The motion carried unanimously.

Checkpoint Learning

A motion was made by Mr. McManus, seconded by Mr. Debessay, to table the ethics course. The motion carried unanimously.

Smart Pros Ltd.

A motion was made by Mr. McManus, seconded by Mr. Debessay, to table the ethics course until the next scheduled meeting. The motion carried unanimously.

Professional Education Services, LP.

A motion was made by Mr. McManus, seconded by Mr. Debessay, to approve the ethics course. The motion carried unanimously.

CPEthink.com, Ltd.

A motion was made by Mr. McManus, seconded by Mr. Debessay, to table the ethics course. The motion carried unanimously.

Becker Professional Education

A motion was made by Mr. McManus, seconded by Mr. Debessay, to table the ethics course. The motion carried unanimously.

Sequoia CPE

A motion was made by Mr. McManus, seconded by Mr. Debessay, to approve the ethics course. The motion carried unanimously.

New Business

Review of CPA Permit to Practice – Reinstatement Applications

Calvin Andersen

A motion was made by Mr. McManus, seconded by Ms. Smith, to approve the application of Calvin Andersen. The motion carried unanimously.

Chad Muhlestein

A motion was made by Mr. McManus, seconded by Ms. Smith, to approve the application of Chad Muhlestein. The motion carried unanimously.

Robert Grier

A motion was made by Mr. McManus, seconded by Ms. Smith, to approve the application of Robert Grier. The motion carried unanimously.

Review of CPA Permit to Practice Applications

A motion was made by Mr. McManus, seconded by Ms. Kaza to approve the application of Syed Ishrat Zaidi. The motion carried unanimously.

A motion was made by Mr. McManus, seconded by Ms. Kaza to approve the application of Yufei Fu. The motion carried unanimously.

A motion was made by Mr. McManus, seconded by Ms. Kaza to approve the application of Maria Ser. The motion carried unanimously.

A motion was made by Mr. McManus, seconded by Ms. Kaza to approve the application of Tian Zhou contingent upon AICPA Ethics Exam scores and Social Security exemption form. The motion carried unanimously.

A motion was made by Mr. McManus, seconded by Ms. Kaza to approve the application of Sarah Ketzer contingent upon the AICPA Ethics Exam score. The motion carried unanimously.

A motion was made by Mr. McManus, seconded by Ms. Kaza to approve the application of Lu Gu. The motion carried unanimously.

Review of PA Firm Permit to Practice Applications

A motion was made by Ms. Patterson, seconded by Mr. Debessay, to approve the application of M. Wilson Accounting & Bookkeeping Svc. LLC. The motion carried unanimously.

Review of Name Change

RKL LLP

A motion was made by Ms. Houck, seconded by Ms. Kaza, to approve the name change from Reinsel Kuntz Leshner to RKL LLP. The motion carried unanimously.

CG Accounting Group

A motion was made by Ms. Houck, seconded by Ms. Kaza, to approve the name change from Gregory & Associates to CG Accounting Group, LLC. The motion carried unanimously.

Request for Exemption

Jonathan Kwok Wing Lam

A motion was made by Mr. McManus, seconded by Ms. Patterson, to approve Mr. Lam a 6 month extension for his CPE's. The motion carried unanimously.

Request of Inactive Status of Licensure

A motion was made by Ms. Houck, seconded by Ms. Kaza, to approve the inactive status of: Christopher DeMartin, Xiaofang Wang, Brian Trout, Kathleen Acker-Donnelly, Paul Dean, Alex Steinberg, Marc Benda, Jay Chandler, Rachel Tan, Liang Dong, Alain Dubois and John Lingo. The motion carried unanimously.

A motion was made by Ms. Houck, seconded by Mr. McManus to amend the agenda and add Carrie Yeung. The motion carried unanimously.

A motion was made by Ms. Houck, seconded by Mr. McManus to approve the inactive status of Carrie Yeung. The motion carried unanimously.

Review of Relinquishment of License

A motion was made by Mr. McManus, seconded by Ms. Houck, to approve the relinquishment of licensure of Christina Chepel. The motion carried unanimously.

A motion was made by Ms. Houck, seconded by Mr. McManus to amend the agenda and add Lynsey Eppeneder. The motion carried unanimously.

A motion was made by Mr. McManus, seconded by Ms. Houck, to approve the relinquishment of licensure of Lynsey Eppeneder. The motion carried unanimously.

Review and Consideration of Hearing Officers Recommendations

Han Kim

A motion was made by Ms. Houck, seconded by Mr. McManus, to approve the recommendation with some amendments. The motion carried unanimously.

Victoria Shifrin Leeker

A motion was made by Ms. Houck, seconded by Mr. McManus, to approve the recommendation. The motion carried unanimously.

Dawn Schumaker

A motion was made by Ms. Houck, seconded by Mr. McManus, to approve the recommendation with some amendments. The motion carried unanimously.

Kelly Tsang

A motion was made by Ms. Houck, seconded by Mr. McManus, to approve the recommendation with some amendments. The motion carried unanimously.

Thomas DiEgidio

A motion was made by Ms. Houck, seconded by Mr. McManus, to approve the recommendation with some amendments. The motion carried unanimously.

Review of Delaware Specific Course

Delaware Society of CPA's Ethics Course

A motion was made by Mr. McManus, seconded by Ms. Houck, to approve the ethics course. The motion carried unanimously.

Ratification of Application

A motion was made by Ms. Patterson, seconded by Mr. McManus, to approve the ratification of applications for Joseph McGrory, Robert Yemola and Brian Donley. The motion carried unanimously.

Correspondence

Payal Patel

Payal Patel requested that the board allow him an exemption from the 4 year Baccalaureate degree requirement.

A motion was made by Ms. Kaza, seconded by Mr. McManus, to deny the request for an exemption. The motion carried unanimously.

OTHER BUSINESS BEFORE THE BOARD (For Discussion Only)

Delayed Score Releases for CPA Exam

Ms. Houck reiterated that the board will be granting extensions for CPA exam candidates who have scores expiring in Q3 and will not get to re-test due to the scores not being released for 4 months. The board will approve any person who falls into this category, an extension until December 31, 2017. They will have to notify the board.

Length of Inactive Period

The board wants to add a 5 year inactive period to the regulations. Mr. Maloney suggested that the board add this to the list of modifications that need to be made to the regulations.

The board also stated that in order to be inactive you have to be out of the profession, not working in the profession at all. If a licensee is still working in the profession (anywhere) they are not eligible for inactive status, they would have to relinquish their Delaware license. Mr. Maloney stated that he will check and find out if the individual is able to work in other states while being inactive in Delaware.

Stephanie Saunders- Use of Title Language

Ms. Saunders spoke to the board on exposing (not endorsing) language in the UAA to carve out language for non-CPA management accountants. She also presented a power point that NASBA developed on Nano & Blended learning. A video was presented showing an example of Nano learning, as well as what a provider needs to submit to the National Registry for NASBA CPE. The board reiterated that their statute does not permit Nano & Blended learning currently.

PUBLIC COMMENT

NEXT SCHEDULED MEETING

The next meeting will be held July 19, 2017 at 9:00 a.m. in Conference Room B, second floor of the Cannon Building, 861 Silver Lake Boulevard, Dover, Delaware.

ADJOURNMENT

A motion was made by Ms. Schultz, seconded by Ms. Patterson to adjourn the meeting. The motion carried unanimously. The meeting adjourned at 11:24 a.m.

Respectfully submitted,

A handwritten signature in black ink, reading "LaTonya Brown". The signature is written in a cursive, flowing style with a large initial "L" and a long, sweeping underline.

LaTonya Brown
Administrative Specialist II